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Header 5

List View

General Information

Contact

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Document Information

Procurement Folder: 570364

SO Doc Code: CRFQ

Procurement Type: Central Master Agreement

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SO Doc ID: TAX1900000012

Legal Name: INOVA HEALTH CARE SERVICES

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Solicitation Description: Addendum 3 Open End Contract for Employee Assistance Program

Total of Header Attachments: 5

Total of All Attachments: 5



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Solicitation Response**

Proc Folder : 570364

Solicitation Description : Addendum 3 Open End Contract for Employee Assistance Program

Proc Type : Central Master Agreement

Date issued	Solicitation Closes	Solicitation Response	Version
	2019-05-22 13:30:00	SR 0702 ESR05211900000005352	1

VENDOR
000000197451 INOVA HEALTH CARE SERVICES

Solicitation Number: CRFQ 0702 TAX1900000012

Total Bid : \$0.00 **Response Date:** 2019-05-21 **Response Time:** 15:07:33

Comments:

FOR INFORMATION CONTACT THE BUYER
 Brittany E Ingraham
 (304) 558-2157
 brittany.e.ingraham@wv.gov

Signature on File	FEIN #	DATE
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All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Open End Contract for Employee Assistance Program	0.00000	EA	\$2.830000	\$0.00

Comm Code	Manufacturer	Specification	Model #
84131609			

Extended Description : PLEASE SEE EXHIBIT A PRICING PAGE.
 The Pricing Pages contain a list of the Contract Items and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

Comments: The PEPM price of \$2.83 includes an 8-Session counseling mode, full work/life services, telephonic wellness coaching + portal, full onsite implementation and orientation, as well as all onsite time requested in RFP for staff training and seminars.



State of West Virginia Request for Proposal for a Employee Assistance Program RFP# 0702 TAX1900000012

Technical and Financial Response prepared by:

Inova Employee Assistance

May 22nd, 2019

Inova Employee Assistance

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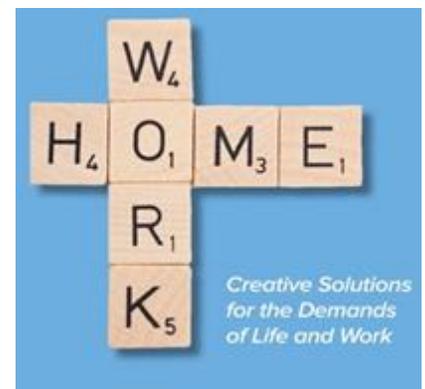


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Brittany Ingraham
Department of Administration
Purchasing Division
2019 Washington St E
Charleston, WV 25305

Re: RFP for Employee Assistance Program (EAP) Service Provider for the State of West Virginia-
Department of Taxation.

Dear Ms. Ingraham and the EAP Selection Committee,

Thank you for allowing Inova Employee Assistance (Inova) the opportunity to propose EAP services for The State of West Virginia- Department of Taxation and your employees. We welcome this opportunity to introduce you to our services and demonstrate how Inova can help reduce health care claims, increase productivity, and reduce employee turnover for the Department of Taxation. This proposal is tailored to meet and exceed the State's needs and requirements, and we believe our services are best suited to support your employees, and their families.

Inova is a leading local healthcare organization, with our headquarters in Fairfax, VA. As we currently serve multiple different entities within the State of West Virginia, we have the unique ability to serve The Department of Taxation and the same responsive, and high-touch manner as we do our other valued clients within the State. Not only does Inova have a robust network of internal, as well as affiliate providers to serve the State, but being so close by we also have the capability to respond immediately to all emergent (and non-emergent) onsite requests from the State.

Inova Employee Assistance (Inova) has been providing EAP services since 1981. During that time we have been heavily focused on serving public-sector/government employers including State, City, State, District and Federal Government entities. Over 80% of our book of business is comprised of municipal employers and we are proud to have many of those organizations compose some of our longest running clients. Inova Health System has a history dating back to the late 1800's and has continuously grown not only in the D.C. Metro area, but well beyond. Our EAP program now covers clients in all fifty states and in over 180 countries around the globe. Inova programs are continually revised and expanded to meet the needs of an ever-changing workforce.

At Inova, we feel that our individual approach to each client regardless of size allows us to learn about the people behind the contract and create a customized services delivery method which accounts for the uniqueness of the organization and the employees themselves. Our clients are never a number based on an employee count.

Inova will provide the State an 8-Session counseling model combined with our robust work life offering, and wellness coaching model at a PEPM rate of \$2.83. Inova will also include onsite time for implementation, orientations and employee trainings and seminars per- the RFP. We have included in your PEPM all requested onsite time to be utilized at the State's discretion for supervisor trainings, health fairs, and seminars.

We invite you to read more about how these services can make a positive difference for your organization and help protect your most valuable asset, your employees. Serving our local municipalities is and has been the primary mission of Inova Employee Assistance since the inception of our program, and we would be honored to serve the State's Department of Taxation.

If you have any questions regarding this proposal, please feel free to contact me at 571 472-0160 or Alexander.Piguet@inova.org.

Best regards,



Alex Piguet
Contracting Officer
Inova Employee Assistance
(571) 472-0160 (o)
(703) 385-2090 (f)
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INOVA BACKGROUND & EXPERIENCE

Inova is one of the country's leading not-for-profit healthcare providers and has been serving the community for over 150 years. Inova is one of only four health care systems in the U.S. with a AA+ bond rating which makes us one of the most financially stable health care organizations in the country.

Inova Employee Assistance was founded in 1981. Inova EAP excels at providing employee assistance programs, work-life consulting, and training services to public sector clients throughout the US. This includes work-life needs assessments, policy development, and implementation. For over 35 years, Inova EAP has continued to grow to become one of the leading employee assistance programs in the country. Our EAP headquarters is located in Fairfax, VA.

Through our holistic approach to EAP, we provide employee-focused services that provide confidential, reliable guidance for a wide range of challenging issues- stress management, family care, anxiety, depression, dealing with loss, and legal and financial concerns. The proactive use of the EAP by employees can reduce the frequency of workplace incidents, overall medical claims, and absenteeism, while at the same time increasing productivity and moral in the workplace keeping your employees emotionally healthy, happy, and at work. ***Throughout this proposal, we will relay to the State how this approach will improve your employee productivity, while reducing workplace absenteeism and turnover, resulting in significant cost savings to the State.***

At Inova, we feel that our individual approach to each client regardless of size allows us to learn about the people behind the contract and create a customized services delivery which accounts for the uniqueness of the organization and employees themselves. Our clients are never a number based on an employee count. We strive to provide superior results to each client and offer some unique differentiators in the EAP marketplace:

- **Reduction in Health Insurance Claims** – 93% Case Resolution within EAP, reducing payout by Employer and Employee
- **Satisfaction with EAP Services** – Inova has a 99% customer retention of our clients year over year many of them who have been with us for 25+ years. We also have a 98% employee satisfaction rate, ensuring that we provide the services employees are looking for
- **Reducing Workplace Absenteeism and Unplanned Absences**
 - Avoidance of work loss in 60% of cases, with an average savings of 17 hours per case
 - 72% of the people receiving EAP care exhibited improved work productivity, with an average gain of 43%
 - Facilitating safe, timely, and effective return-to-work for employees following short-term and extended absences
- **High Utilization Rates** – In 2018, Inova saw 9-13% utilization for government municipalities
- **Value** – Inova offers comprehensive services, 24/7 support, on-call dedicated account management, and competitive pricing

- **Financial Stability** – As mentioned previously Inova has the financial backing and resources to continue to grow and evolve to meet the ever changing needs of your employees.

Inova has been focused on the public sector marketplace for over 30 years. We deliver a program that offers the State the following advantages:

- **Genuine Program Integration** – Inova offers the State a seamless program without sacrificing expertise in any area of service. Employees only have to call one number to access the program and we take care of the rest. Whether an employee needs short-term counseling or a child care provider, our in-house team knows our products through-and-through and will provide the employee with the most comprehensive and holistic solution.
- **Answer-Model** – Our services are available 24/7—and master’s level clinicians, based in Alexandria, VA and Raleigh, NC answer all calls live in a supervised clinical call center environment. We do not employ customer service representatives and there are no after-hours periods.
- **Outstanding Customer Service** – Our organization has an excellent reputation for delivering high-touch account management. ***Inova specializes in delivering EAP services to government entities and municipalities throughout the country.*** Our key distinguisher is our highly credentialed, experienced team. The State will not be just another account in our book of business. We will collaborate directly with the State to help ensure the success of the EAP for your specific population across each individual location.
- **Multiple Modes of Access** – Our program is intended to be user-friendly and to meet 100% of employees where they’re at, regardless of any generational, cultural, and personal preferences. In addition to toll-free access, employees may access the EAP via LiveCONNECT instant messaging, text, email, and our Inova EAP application.
- **Provider Network Model** – Inova Employee Assistance works off of a network provider model. We have a very robust network for the State, as well as the entire region. Your employees will have the benefit, and flexibility of seeing providers for counseling near their home, or workplace, whichever is more convenient. In addition, *our extensive provider network allows Inova the ability to pair each employee and their specific need with certain providers who specialize in those fields/areas of concern.*

Inova has partnered with and will continue to partner with Workplace Options (WPO) for our provider network outside of the Metropolitan Washington area as well as our call center.

Response to Scope of Work

Our EAP program design involves the use of our in-house counselors, our network of affiliate counselors, and our in-house work-life specialists. Our in-house counselors deliver telephonic counseling, online counseling, and case management services, while affiliate providers deliver face-to-face counseling and some telephonic counseling.

Employees and their family members may access our EAP 24/7 for confidential support with a variety of personal and work-related issues, including but not limited to:

- Anxiety
- Bereavement
- Bullying/harassment/discrimination
- Care problems related to child care/elder care/disability care
- Career/job-related stress
- Substance abuse
- Domestic violence
- Family/relationship issues
- Legal/financial concerns
- Gay/lesbian/gender issues
- Health problems
- Illness of family member
- Matrimonial/domestic settlement problems
- Redeployment/relocation/redundancy
- Stress management

When employees contact the EAP, they will first speak to one of our in-house counselors who performs the intake and initial assessment. The counselor then determines the most appropriate course of action, which may be a confirmed referral to short-term counseling, referrals to community resources for issues outside the scope of the EAP, or a warm transfer to a work-life specialist. Our work-life specialists deliver resource and referral services, providing practical assistance to employees around a wide variety of issues.

Counseling

Short-term Counseling

The primary counseling model that we use is called short-term solution-focused counseling. This involves a move away from the analysis of problems to the discovery of solutions that are already at work in an individual's life. The therapy concentrates on helping individuals identify the skills, strengths, and resources that are already present and moves them towards a solution.

Access

State employees, spouses, and dependent children, as well as graduate students, can access any of the services we provide, for any issue they face, without limitation. Our services are available via toll-free phone 24 hours per day, seven days per week, 365 days per year—and master’s level counselors answer all calls live in a supervised clinical call center environment. There are no automated attendants, voicemails, or pagers, ensuring after-hours, weekend, and emergency calls are answered and managed in the same manner regardless of the time the call is placed.

In addition to contacting our services by toll-free phone, participants have the option of accessing the program via email, LiveCONNECT instant messaging, and our iConnectYou smartphone app (phone, video, instant message, or SMS text).

Referral Process

Should an employee want to contact the EAP for assistance, he or she can access the service directly and need not involve a manager. This allows your employees to feel more confident that the EAP is a confidential resource, available to address their personal or professional needs.

With this said, confidential formal referrals of employees to the EAP are welcome, and can be arranged quickly and easily. Neither the State, nor Inova, can force an individual to seek assistance through the EAP, but provided that Inova has the signed consent of the employee, we will contact him or her as soon as the referral form has been received.

Assessment Process

The assessment process, which determines the need for counseling, begins at the case intake. All clinical calls receive a thorough, telephonic clinical assessment that includes expert identification of the presenting problem or need; investigation into support systems; coping strategies; background information; and a mandatory risk assessment. This conversation will help the counselor determine the most beneficial support option for the caller’s needs.

For an emergency (immediate/life-threatening) counseling need, we deliver immediate telephonic intervention and if needed, connection to emergency services. The counselor will remain on the phone with the participant until emergency services arrive and will also remain available to discuss case and assessment information as needed to assist with the participant’s admission.

After the assessment, once counseling is deemed appropriate, the employee will be matched with a counselor who meets his or her particular needs and preferences (e.g., gender, ethnic background, training, or experience in a particular area).

For an urgent counseling need, we will provide the participant with a confirmed referral within six business hours. The referred counselor will have availability for an appointment within 48 hours of the initial assessment.

For a routine counseling need, we will provide the participant with a confirmed referral within two business days. The referred counselor will have availability for an appointment within five business days of the initial telephonic assessment.

Counseling Sessions

Telephonic counseling takes place in a structured format with the counselor and individual pre-agreeing on times for each of the (up to) 8 sessions.

Face-to-face counseling is normally provided at a counselor's approved premises, at a location convenient to the employee's home or work address. To ensure confidentiality, we require affiliates' counseling facilities to be private. For individuals with a handicap, we ensure the provider's facilities can accommodate their needs. This may include, but is not limited to on-site parking, elevator access, and wheelchair ramps.

The participant works with the counselor to schedule each of the (up to) the agreed upon sessions. Most counseling appointments are arranged between the hours of 8 am and 8 pm, Monday through Friday; however, we have a number of counselors in the network who can schedule appointments after hours and on weekends. Sessions are typically one hour in length.

Long-term Counseling

Short-term counseling through the EAP may not be adequate to meet every individual's needs. If the initial assessment establishes that long-term specialist counseling is required, or if this is identified at an early stage of the counseling process, then we can make an external referral to ensure that the employee is placed on the path he or she needs to get more intensive support. Similarly, after an employee has completed his or her allotted sessions of counseling covered by the EAP, we may refer him or her to community resources.

While long-term specialist counseling is not included in the cost of the EAP, whenever possible, onward qualified referrals are otherwise made to no-cost or low-cost services in a location convenient to the participant. These referrals are customized based on the individual's unique needs. We utilize internal provider databases and our research teams to locate appropriate referrals for each participant. A clinician will then follow up with the participant to provide the necessary support and encouragement to ensure the participant engages with the recommended action plan.

In addition, if a participant has medical coverage through the State, we will try to refer them to a counselor who accepts the insurance plan for possible coverage after EAP sessions end. We also store information about the local medical providers in the BenefitCONNECT section of our case management system, so that we are able to share program contact details with the participant and/or coordinate a warm transfer.

Case Management

All cases are managed by case managers who are responsible for managing the progress, the quality, and the clinical content of the counseling. All clinical cases include telephonic follow-up with the referred provider and the participant at prescribed intervals during the case process to ensure quality and satisfaction.

Based on an eight-session model, in our experience, 95% of cases are resolved within the allotted sessions or less.

Counselor Qualifications

In-House Counselors

All in-house counselors have a minimum of a master's degree in a behavioral health discipline, are licensed or provisionally licensed, and have at least two years of previous clinical experience. They complete an intensive in-house training program, participate in mandatory ongoing training, and are supervised by an experienced clinical management team. In addition, our clinicians are experienced in intake and crisis management, clinical assessments, chemical dependency, trauma response, and other relevant interventions.

Affiliate Network

Inova is ideally situated to serve the State's employees both in, and out of the State of West Virginia. Our affiliate providers deliver face-to-face counseling and we have an extensive nationwide network of more than 55,000 EAP credentialed professional. **This includes 173 providers within the State of West Virginia. Detailed provider report located in the Appendix.**

Providers in West Virginia	
State / Provider Type	Number Providers
WV	
Advanced Registered Nurse Practitioner	1
Master Level Clinician	25
Nurse Practitioner	1
Professional Counselor	55
Psychologist	39
Social Worker	52
Grand Total	173

As a certified Credentials Verification Organization (CVO) through the National Committee for Quality Assurance (NCQA), our credentialing process complies with the rigorous standards set forth by the NCQA for primary source verification. The minimum standards for network inclusion are as follows:

- Possession of a master's degree in a mental health discipline.
- Five years' experience in the direct provision of clinical care.
- Current and unrestricted license as a mental health practitioner at the independent practice level; exceptions may be made for rural, remote locations that are served by providers who are licensed or certified but must be supervised as a condition of licensure or certification. Consideration of community standards guides the determination for making an exception.
- Maintenance of professional liability insurance at the level of \$1 million per occurrence and \$3 million aggregate.
- Attestation/disclosure to the existence of prior sanctions or limitations to license, malpractice claims history, the existence of felony convictions, and the ability to perform the essential functions of an EAP counselor.

Qualifications for licensure, accreditation, certification, and/or registration to perform mental health counseling are determined by local government, professional associations, or other authority. Our practice is to conduct primary source verification of the credential that is required to practice in the clinician's particular location. If license or registration is issued by a local regulatory authority in a mental health-related discipline or equivalent, it must be current and in good standing. If a local professional association issues an accreditation or certification for mental health-

related counseling in social work, psychology, or a related field of mental health or regional equivalent, it must be current and in good standing.

Critical Incident Support

We have experience responding to small- and large-scale critical incidents including employee death, violence, workplace accidents, terror attacks, natural disasters, and layoffs/restructuring. We offer various services, including information, practical support, telephonic crisis support, management consultation, crisis preparedness trainings, on-site group/individual meetings, and face-to-face counseling. The ultimate objective of our post-incident service is to assist employers with decreasing the number of psychological casualties among employees to facilitate a return to regular business as quickly as possible.

Within 30 minutes of the notification of an incident, one of our experienced incident managers (IM) will engage you in a management consultation. The IMs are clinical trauma professionals who will support you from the initial consultation, to establishment of the intervention plan, through the event and post-event follow-up. Along the way, they are constantly checking in with the client representative to make sure we are doing everything we can to help. For each critical incident that we respond to, the IM is in contact with the client representative about one hour per onsite hour.

It is important to note that immediate on-site counseling is not always clinically appropriate. Bringing a trauma professional on site immediately may increase employees' level of anxiety, as they wonder if there is more to what happened than they were aware of. With this said, when appropriate, a qualified trauma professional can arrive on site within as few as three hours, based on the intervention plan determined during the management consultation. We also offer an unmatched level of post-incident support. This includes outreach to affected employees and guidance for managers, providing them with information on how to identify and support employees who may need assistance after the onsite response has concluded. We know that, in many cases, the impact of a trauma does not manifest immediately, but may take a few weeks. With our outreach, we ensure that no one falls through the cracks.

DOT/SAP

Inova will coordinate this for the State. All SAP professionals are certified through a nationally recognized certified organization. We will make every attempt to use the State's EAP account manager or management team to provide these services. IEA substance abuse professionals (SAP) will evaluate and case manage employees who have tested positive under DOT/DOD regulations. We will:

- Assess the employee's problem with alcohol or drugs.
- Recommend a course of education and/or treatment.
- Coordinate treatment referrals.
- Conduct a face-to-face follow-up evaluation prior to return to safety sensitive duty.
- Determine the appropriate follow-up testing schedule, monitor employees throughout the entire process.

Trainings/Seminars

We offer on-site and web-based workshops and seminars to support a full range of work/life and workplace management issues. Types of seminars offered include:

- Personal development
- Child care
- Older adult/elder/geriatric services
- Legal matters
- Consumer financial issues
- Parenting
- Wellness
- Management strategies
- Organizational development
- Leadership development

Seminar content is designed to assist participants in learning new skills, modifying behaviors, improving communication techniques and utilizing resources that enhance personal effectiveness. Participants gain practical knowledge and useful strategies to help with problem solving and improving relationships. The exchange of ideas and discussion of challenges serves to further enrich the experience of participants.

These seminars are generally offered in one- or two-hour sessions during the lunch hour or workday. Our flexible schedule adapts to your allotted time slot—one-hour, half-day or full-day sessions—or a seminar series. Our seminars are customizable; topics can be expanded, combined, or modified to reflect your specific organizational requirements.

Inova has included a bank of 14 hours that can be used by the State for supervisory and/or educational programs per year, Per the RFP.

Orientations/Presentations

Your account manager can work with the State to coordinate and deliver employee presentations as well as workshops for managers. These presentations provide a thorough understanding of how the EAP works and allow the opportunity for participants to ask questions. The sessions also focus on the very practical aspects of the service, as well as the counseling, so that employees are aware of the broad scope of support that is available.

The manager workshops not only highlight the service provided, but also give managers an understanding of how the EAP can help support them in their role as a manager. The workshops cover topics such as recognizing the warning signs of stress, how to informally refer an employee to the EAP, how to use the formal management referral process, and how to distinguish between healthy pressure and harmful stress.

The outcome of running these sessions is that usage of the EAP increases, as employees and managers understand the full scope of the service. Managers also become more proactive in dealing with difficult employee situations, make more referrals, and know how to use the service as a management tool.

It is important to note that all of our trainings can be offered on-site or as virtual webinars. Webinars are an effective means to reach out to employees who might not otherwise be able to attend an event or seminar. In fact, the program launch with a new vendor is an excellent opportunity to offer webcasts to conduct new program launch orientations to raise employee awareness.

Onboarding/Implementation

Inova works closely with previous EAP vendors to ensure transition of programs is undetectable to end user employee. If possible, we attempt to keep employees with an existing provider to continue counseling. If this option is not available we help to ensure that all counseling cases are transitioned to a new provider. We have included an implementation plan that lays out how we will work with The State to implement the EAP. The State will have a dedicated Account Management team that will provide continuous support for The State and its employees around the EAP. All printed materials are included and will be available in electronic format.

Once the onboarding process has been completed, your account manager will keep an open line of communication with The State. This individual will provide quarterly briefings to the State's HR staff, and will share information on an ongoing basis. If any on-site support is required during the duration of the contract with The State, your account manager will coordinate this, as needed.

Through our own experience delivering services, market research, attendance at conferences, and interactions with clients and brokers, we are well in tune with the employee support industry as well as any changes to legal requirements at the state or federal level. We use this information to

help drive our approach to improving existing services and developing new offerings. In turn, we keep our clients informed of any relevant developments. During review meetings or via email communications, your account manager will share information regarding current best practice in the industry, as well as her knowledge of other clients and their innovations—all the while, maintaining client confidentiality. Our implementation process is broken down into 3 phases: Discovery, Engagement, and Operations. Details on these phases located in full implementation plan.

Actual implementation plan with scheduled dates and goals in Appendix

Other Resources

iConnectYou

iConnectYou is our innovative mobile app that allows users to contact the EAP without having to look up any numbers. Functioning as a virtual wallet card, participants simply choose their preferred mode of communication—phone, video, instant messaging, or SMS text—and tap a button. Master’s level counselors answer incoming requests live 24/7.

Not only can participants initiate contact with the program via the app, iConnectYou is also used to deliver structured telephone, video, or text-based counseling. Participants can connect with experts instantly or make arrangements for a later appointment.

Additional features include interactive self-assessments and informational resources. Users can browse a library of self-help articles about emotional and physical wellbeing with just a few swipes on their phone.

iConnectYou is designed for Android and iOS devices and is available in Google Play and iTunes stores worldwide. We provide employees with a code specific to the State to access the app’s full features.

Aware – Mindfulness-Based Stress Reduction (MBSR)

Our unique research-based MBSR program, Aware, is an alternate modality of support for participants experiencing life stress, pain, and challenges with focus and concentration, as well as individuals who want to increase their awareness of and commitment to intentional living.

With a personalized approach to applying mindful practices to life, Aware teaches participants how to be engaged, diminish distractions, and counteract stress. The program cultivates focused and resilient employees, who are more engaged and productive in the workplace. Through six weekly telephonic sessions, MBSR-trained health and wellness professionals provide on-on-one support and supply electronic resources for self-guided individual practice. Assessments conducted at the start of the program and upon completion provide measurable outcomes to demonstrate personal progress.

Virtual Group Counseling

Our new virtual group counseling program is offered via a secure telephonic conference platform, with video capabilities in development. Participants would be referred to a group based on a clinical assessment. Those referred for group counseling will present with similar issues (e.g., bereavement, work-life balance, anxiety) and without risk.

Each group session is 90 minutes in duration, with eight sessions. Membership to each group will be closed once the first session is held, with a minimum of six and a maximum of ten participants per

group. To protect participants' privacy, we will not refer more than one individual from an organization to the same group. All participants will speak the same language. A clinician oversees each group and ensures a sound contract is adopted during the first session, maintains time boundaries, provides structure to the sessions, keeps the discussion solution-focused, and provides containment.

In My Hands – Computerized Cognitive Behavioral Therapy (cCBT)

In My Hands is a case manager-assisted self-help program that addresses mild to moderate anxiety, stress, and depression. The online program educates users and suggests techniques and tasks designed to guide participant progress for positive therapeutic outcomes. Several modules are available, including Introduction to CBT; Self-Esteem and Thinking Styles; Low Mood and Depression; Stress and Anxiety; and Coping and Resilience.

The self-paced program encourages participants to interact with the application weekly, and to monitor their own perception of how they are functioning in terms of personal well-being, close family relationships, work, and social roles. The course includes seven online CBT sessions, with email and/or telephone support from qualified counselors.

Participants who engage in cCBT have unlimited access to the program for six months, and may complete the sessions as many times as desired within that period. A cCBT case manager follows up with participants to ensure the program is addressing their needs, answer any queries, and review progress toward their goal. Users can also contact their case manager at any time to discuss their progress.

Wellness Coaching (Included in PEPM price)

Our telephonic wellness coaching program offers access to certified professional coaches who provide individualized, goal-oriented guidance, wellness education, strategy development, and encouragement. Individuals and coaches commonly design wellness plans around weight management, nutrition, tobacco cessation, physical activity, stress management, and overall lifestyle improvement.

Together, a coach and participant review the participant's health concerns and wellness goals and create a plan that moves the participant toward improved wellbeing. The coach and participant work together, for an average of six sessions, increasing the participant's self-efficacy and internal motivation for lasting behavior change. During coaching sessions, the participant works to identify support and strengthen new habits which lead to long-term success.

We adhere to the highest of quality in coaching by having the ability to both train our own coaches and provide oversight and development of our coaching staff. Coaches are trained through our own approved coach training program: the Live Well Wellness Global Coach Training Program. This comprehensive coach training is recognized by both the International Coach Federation (ICF) and the International Consortium of Health and Wellness Coaches (ICHWC) as an approved coach

training program. In addition, all affiliate coaches are required to undergo our Foundations of Wellness Training.

Live Well Wellness Platform (Included in PEPM price)

The Live Well Wellness Platform bridges the science of behavior change theory with sophisticated digital technology to meet the challenges of health engagement. Built for users across the health status spectrum, this collection of interactive resources creates a personalized, relevant participant experience.

Simple, direct, visually appealing, the Wellness Platform easily fits into the busy lives of today's health consumers through responsive design for access via computer, tablet, or mobile device.

Available features include:

- An integrated health risk assessment which drives relevant content to new users
- Planning, tracker, and journal tools
- Recipe finder, menus and food database
- Demonstration videos
- Personalization options
- Participant access to a peer community
- Point-tracking*
- Secure communication with wellness coaches *

User-friendly and user-focused, this platform paves the way for ongoing engagement by removing barriers to change and empowering people to adopt healthy habits.

Work-Life Services

We provide consultation, educational information, and qualified referrals to support individual's more practical work-life balance challenges. The scope of topics for which we provide work-life services is almost limitless. A sampling of topics include, but are not limited to:

- Adoption
- Education
- Household tasks and repairs
- Moving and relocation
- Pet Care
- Community Resources
- Child care
- Elder/Adult care
- Leisure and travel
- Parenting
- Pre-Postnatal care
- Wellness

The process begins with a thorough consultation and assessment with a work-life consultant to get a clear understanding of all aspects of the participant's specific request. Consultants often help individuals identify questions that they had not yet considered and take the time to truly understand the specifics of each case and assist the caller throughout the process.

During the initial consultation, the work-life consultant will offer suggestions and ideas for consideration when and where appropriate. Our consultants commonly provide guidance about topics such as the difference between various care options (e.g., day care centers vs. family day care homes), the most cost-effective options, and how to evaluate providers.

A research consultant then identifies potential resources from our database that meet the specific criteria for service such as quality, distance, and cost. The consultant makes telephone contact with each provider in the pool to determine if it is a match. During this call, the consultant verifies the data in the provider profile (e.g., fees, availability, address, hours of operation, program features, etc.) and updates the record. The consultant then selects three to five providers with confirmed vacancies and sends them to the participant according to his/her preference (via email, mail, or fax). Referrals are accompanied by educational materials related to the topic including tip sheets, checklists to help evaluate resources, and handbooks.

Legal Assist

We contract with a nationwide network of attorneys to provide consultation to employees or family members regarding their legal concerns. Callers can obtain support for any legal issue, with the exception of those involving disputes or actions between an employee/dependent and their employer or for business issues.

Following are the top 10 matters for which employees use the legal service:

- Divorce/Custody
- Criminal
- Estate planning/Wills/Trusts
- Real estate
- Landlord/Tenant
- Bankruptcy
- Personal injury/Malpractice
- Debtor/Creditor
- Adoption
- Probate

Legal Assist includes two service options: telephonic advice and local referral. In both options, participants receive a free 30-minute consultation with an attorney. With the local referral option, in most instances, participants receive a 25% discount on fees if additional assistance is required.

Financial Assist

With our Financial Assist program, participants can access a program of comprehensive financial support services—empowering them to concentrate on responsibilities at work, rather than on financial concerns.

The most common financial issues addressed include:

- Bankruptcy counseling
- Budgeting (to cope with reduction in household earnings; to reduce debt; to save; household budgeting)
- Buying a home for the first time
- Major life event planning
- College fund planning
- Credit card debt (lowering rates; consolidating debt)
- Retirement planning
- Foreclosure prevention
- Identity theft prevention

Participants requiring financial services will begin by completing an intake with a financial consultant and presenting his issue(s). In many cases, the consultant can provide issue resolution assistance on the spot. Any callers requesting Financial Assist services outside of business hours will receive a follow-up call from a financial consultant the next business day.

If, after speaking with a financial consultant, issue resolution requires additional preparation, planning, or more specialized financial assistance, the financial consultant will offer the participant an appointment with one of our qualified financial counselors for a detailed telephonic consultation regarding his most pressing financial issues. Appointments with our financial counselors are available Monday through Saturday and typically last about an hour. There is no limit to the length of the consultation or restrictions on repeated use of the service.

Employee Engagement Website

Our participant website features informative articles, assessments, resource links, and audio and video files covering emotional well-being, health and wellness, and workplace issues as well as child care, elder care, adoption, and education. A team of dedicated staff keeps the site content up-to-date on an ongoing basis.

Key site features include:

- English and Spanish sites + 25 other languages
- Entirely customizable layout, including colors, branding, and content options
- Searchable databases and resource links for child care providers, elder care and related services, and resource links for locating attorneys, certified financial planners, pet sitting, private and public high schools and colleges, and volunteer opportunities
- 40 financial calculators
- On-demand online seminars monthly with archiving of past seminars
- Access to Mayo Clinic medical and health information
- eLearning Modules: a diverse library of online training programs
- Savings Center: a discount shopping program offering up to 25% discounts on name-brand goods and services
- Relocation Center: an interactive program that allows users to preview communities across the US, providing vital statistics and comparisons
- 106 ready-to-use legal forms provided by Nolo

LiveCONNECT

In addition to telephone access, participants can contact the EAP through LiveCONNECT. This instant messaging tool is displayed prominently on the website and facilitates an online chat between participants and qualified counselors. Instant messaging is also an excellent alternative method for hearing-impaired individuals to access the service.

Employees access LiveCONNECT on the website simply by clicking on an icon. After clicking on the icon, the user will be asked to fill out a simple form to direct the chat request to the appropriate team. Once the form is submitted, the employee will engage in a live conversation with a counselor. The web-based tool does not require users to download any software to enable access to LiveCONNECT.

Management Consultations

ManagerAssist

Specialized support for supervisors and HR managers is available through our telephonic ManagerAssist program. Through ManagerAssist, a manager can learn how to encourage an

employee to get help with whatever challenges he may face. Counselors commonly offer assistance on topics such as addressing performance issues, referring an employee to the EAP, and building team morale. With this support, the manager can provide the employee with the tools to get assistance, helping to prevent or reduce an absence. This service provides managers with the tools to:

- Balance the imperative for improved performance with the offer of assistance with any personal problems
- Recognize employee absence issues and use early intervention efforts to manage attendance
- Step out of the role of counselor or diagnostician and focus on performance

Reporting

We will provide quarterly and annual confidential management utilization reports. The State's designated account manager will meet with you to review these reports, analyze data, identify trends, and adapt the program based on results. Standard reports include data covering:

- Caller demographics (age, gender, and status)
- Utilization summarized by State-defined division
- Issue categories for counseling and work-life cases
- Identified personal and work-related issues
- General assistance queries (not counted as utilization)
- Web hits
- Method of contact
- Workplace activities (on-site events including training, crisis support, etc.)

Please note, reporting on the formal referrals is available only with the signed consent of the employee in question.

On an ongoing basis, your account manager will closely monitor both utilization trends and success of the promotional campaign, and will work closely with you to adapt the program as needed. Inova will be available to conduct monthly discussions with the State to review the program's effectiveness and address any concerns.

Surveys

We have developed an Interactive Voice Response (IVR)-based satisfaction survey that is offered to users live at the end of a call. The participant uses a phone keypad to respond, answers three questions, and has the opportunity to leave detailed comments via voicemail at survey end.

Since launching this survey, we found a significant increase over the number of responses we currently receive from email or paper surveys. The YTD response rate is at 17%. Typical response rates for traditional email/online EAP surveys are lower than 3%. We also found the responses to be overwhelmingly positive:

- 98.8% felt we cared about them and their request
- 98.5% felt that we helped them
- 98.8% felt that their company made the right decision in hiring us to provide the service

In addition to this IVR survey, we send post-services surveys out to participants who have received support. This easy-to-complete, web-based survey includes the same three questions asked in the IVR survey.

Performance Guarantees

Service level agreements (SLAs) are a key component of our quality systems and performance management. Our standard SLAs regarding quality and performance are tied to call answer times, abandonment rates, availability of counselors, complaints, account management support, and overall client satisfaction.

We will work with the State and FCPS to agree upon service level agreements and will report on achievement of these standards.

Performance guarantees are a key component of our quality systems and performance management. Our standard performance guarantees regarding quality and performance drive our commitment to customer service and are tied to call answer times, abandonment rates, availability of counselors, complaints, account management support, and overall client satisfaction.

We will work with the State to agree upon service level agreements and will report on achievement of these standards....

Key Performance Indicator	Target	At Risk %
All calls received by the Inova call center are to be answered within thirty (30) seconds.	85%	1%
Call abandonment rate: "Call abandonment" means Participant disconnections due to extended wait times."	≤ 5%	1%
For the face-to-face counseling, the counselor's premises are to be within a 30-mile radius of the employee's home or work.	95%	1%
Formal complaints from Participants are limited to not more than 5% of total calls received during any calendar year. The complaints are considered to be formal when they submitted in writing to Inova and acknowledged in writing by Inova as a formal complaint. Electronic submission is considered acceptable for this purpose. For the purposes of this key performance indicator, the sample size of total calls received will not be less than 100 calls.	5%	2%
In the course of its business, Inova conducts surveys and evaluates the participants' feedback. 90% of these surveys evaluations are to report results as "Satisfactory" or better. For the purposes of this key performance indicator, the sample size of total participant feedback will be based upon not less than a 10% return rate.	90%	3%
Verified referrals for work-life services will be provided within three business days of initial contact.	95%	1%
Quarterly reports, including executive summaries, are delivered within twenty (30) calendar days of each quarter end date. Annual reports are delivered within forty-five (45) calendar days of each calendar year end.	100%	2%

Program Promotion

To effectively promote our services, we offer a variety of promotional materials (also available in hard-copy format at cost), including brochures, posters, content for announcement communications (e.g., a letter from the HR Director), and a launch email. All of our promotional materials emphasize that the program is both free and confidential.

Our calendar of monthly themes reflects topics of interest to working people such as work-life balance, wellness, child care, elder caregiving, and legal and financial issues. Our materials focus on positive outcomes to typical challenges, and embrace a broad selection of employee assistance and work-life topics. All documents are provided in Microsoft Word so they can also be easily edited for content. PDF and/or print-ready files are available.

As an additional component to the EAP we offer monthly on-demand webinars through the EAP website. Webinars include topics such as relationship building, communication, stress management, and healthy living, and all events are delivered by topic specialists. Each topic links into the theme for the corresponding month's EAP promotion, so employees can be reminded to call the EAP for information and support on an issue, as well as view a supporting webinar. Employees can ask questions and receive customized answers; they may also reference previously posed questions and corresponding answers posted in the FAQ section.

All of the materials listed below are available in electronic format and can be desktop printed. We can also provide print-ready documents and arrangements can be made to have pieces professionally printed. Promotional items include:

- **Orientation PowerPoint Presentation** – describing each aspect of the service, and providing examples of how the service can be utilized
- **Program Brochure with wallet card** - describing all available EAP and work-life components of the program (hard copy and electronic version)
- **Program Posters** – outlining program highlights and access information, these are appropriate for posting in a shared space such as a lunchroom (hard copy and electronic version)
- **Topical Flyers** – the State can select from a list of topics ranging from financial concerns to stress management
- **Webinar Announcements** – following the calendar of topics established in the work plan, each poster describes the monthly theme and encourages employees to take advantage of the resources offered by the program
- **Healthy Pathways** – a quarterly newsletter, focusing on specialized



health and behavioral topics such as diet and nutrition, and time management

- **Lifelines** – our quarterly newsletter of work-life articles and seasonal topics
- **Frontline Supervisor** – our newsletter, with tips and advice for supervisors on monitoring employee performance, issue resolution, as well as examples of common struggles that supervisors face
- **Disaster Relief Blasts** - a newsletter with prompt delivery of emergency response information for major weather or terrorist events.



We maintain our own internal graphic design and service promotion staff who will work with the State to ensure appropriate branding of the service. All of the materials above will be white labeled under the State brand, and tailored specifically for the State, reflecting the necessary policies and practices adopted by the State. We will ensure we uncover all of this information on State policies and practices during the initial phase of our implementation.

Samples of all marketing materials are located in the Appendix.

Confidentiality

Maintaining confidentiality is a fundamental requirement for all aspects of our EAP service provision and we preserve client confidentiality at all times in accordance with the Employee Assistance Professionals Association (EAPA) Code of Ethics; Health Insurance Portability and Accountability Act (HIPAA); other relevant professional guidelines; and the law. Disclosure of personally identifiable and sensitive information is allowable only when there is authorization by a participant’s consent, or when required by law. When disclosure does occur, it should be undertaken in ways that best protect the participant’s trust.

A data protection officer has been appointed who is responsible for day-to-day data protection matters and for developing specific guidance on data protection issues. Our senior management team, the quality team, and all those in managerial or supervisory roles are responsible for developing and encouraging good information handling practice within the service.

Our specialists and counselors will convey the limits of confidentiality when asked and provide this information clearly in informed consent materials offered to participants. Where a counselor or specialist is faced with a participant who is assessed to be a danger to himself, herself, or others, the counselor must advise the participant of the possible limits to confidentiality in that context. As

a condition of employment, our employees are required to read and sign a confidentiality agreement, outlining the appropriate guidelines for use and handling of confidential information.

To ensure that each service center is a confidential environment, staff members are required to follow and maintain the following minimum guidelines:

- Confidentiality of every participant's information will be respected at all times. Use of a participant's name, location, and situation will not be shared with any non-service delivery staff member or anyone outside of our organization.
- Workstations must be locked when not in use.
- Access to all case/participant information is through authorized password access only.
- Employees may enter the service center only with an assigned key card with employee identification.
- Visitors must enter the service center only through the front entrance, provide identification, sign a confidentiality agreement, and be escorted by a staff member with key card access.
- Printed information should be collected promptly from printers or photocopiers.
- Confidential information that must be saved should be archived in private folders. If the information is no longer required, it should be shredded as per policy.

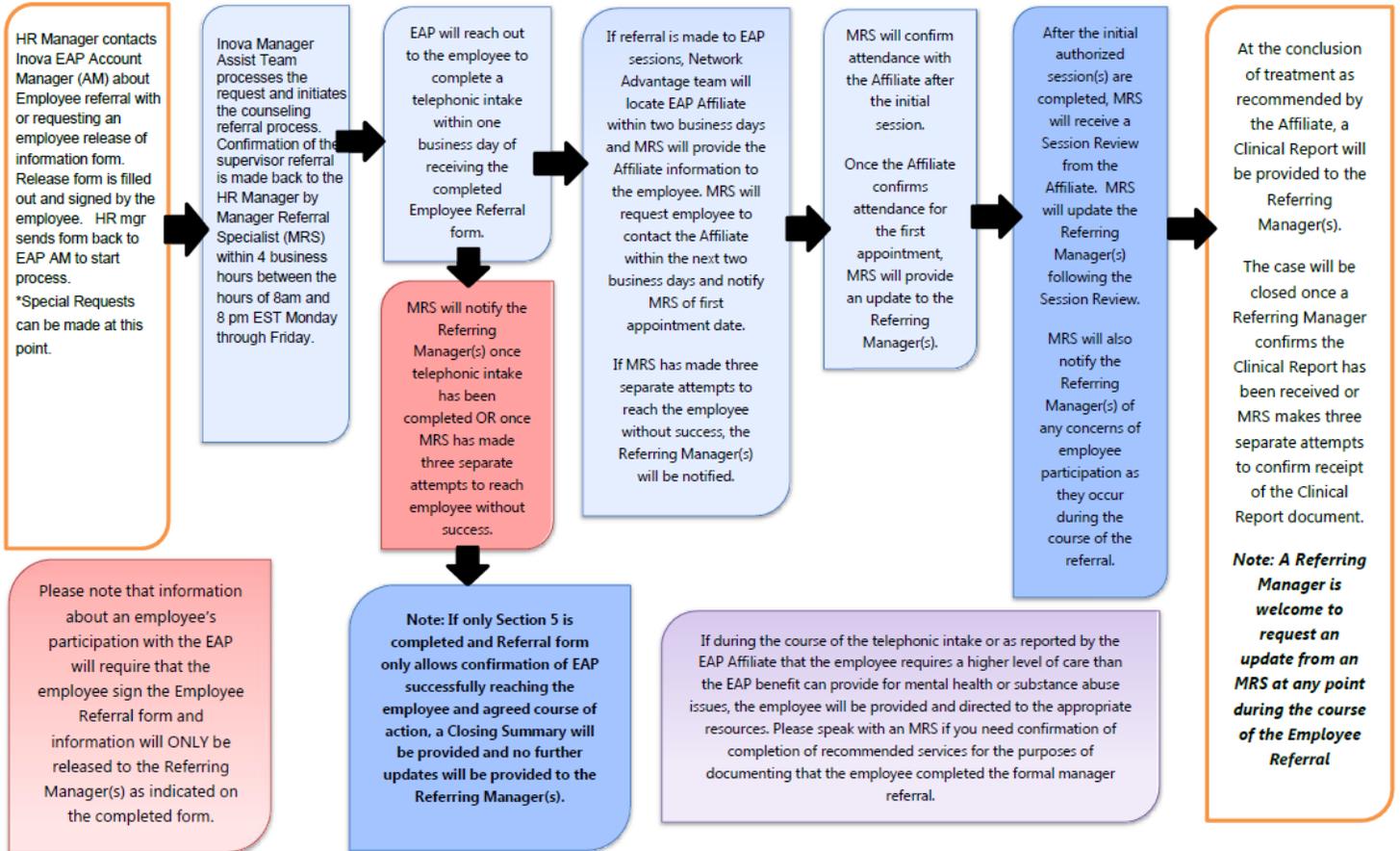
We do not provide any reports that could compromise employees' privacy. We do not individually report on a division so small (≤ 50 employees) that there is a risk for disclosing individual employee information; such statistics are incorporated into regional reports. For locations with 50 or fewer employees, the only data to be provided is an indication of whether or not there was utilization. For locations with 51 to 250 employees, we provide an Organizational Report, which includes statistics related to gender, type of support, source of information, and methods of contact.

In addition, reporting on the support provided through mandatory referrals is available with the signed consent of the employee in question.

Our formal Manger Referral process is laid out below. We are able to provide regular communication with both employees and supervisors through out this process.

Formal Manager Referral Process

Description: Employer initiated referral to manage a personal or professional issue that is impacting an employee's work performance



In addition to the tools included in our Manager Assist program the State's account management team will provide ongoing assistance to State managers for referrals. Please note, reporting on the formal referrals is available only with the signed consent of the employee in question.

The State's Account Management Team

Inova prides itself on providing each client organization with superior customer service, follow-up and issue resolution. We offer a team approach to our clients to ensure uninterrupted coverage and support. The account management team below will provide the time and resources needed and requested by the State's Department of Taxation.

All staff resumes are located in the Appendix.



Jessie Joachim, LPC, MA, NCC will be the primary account manager for the State. Jessie has over 10 years of EAP and related customer support experience, including experience managing accounts of similar size and scope to the State. She has the privilege of serving multiple other entities within the State. Jessie holds a master's in Community Counseling from Argosy University and BA in Psychology from Temple University. She is a Nationally Certified Counselor as well as Certified DOT Drug Collector and Breath Alcohol Technician. Jessie has worked directly for several organizations as their EAP support specialist. She also has worked as a conflict resolution coordinator.



Cheryl Tillman, M. Ed, CEAP will also be part of the primary account management team for the State. Cheryl has over 20 years of EAP account management experience including experience managing accounts of similar size and scope to the State. Cheryl holds a master's degree in guidance and counseling from the University of North Carolina. Cheryl is a Certified Employee Assistance Professional (CEAP). Cheryl has managed all types of EAP accounts over her career and is experience training specialist, developing and delivering on-site training and seminars. She also has an extensive background in Critical Incident Services coordination and delivery.



Geetha Desikan, LPC, CEAP has over 13 years of experience in providing mental health, substance abuse, EAP and work-life services. She is experienced in short-term counseling, problem identification/assessment, referrals and follow-up services and is highly proficient in management and work-related consultations. Geetha has expertise in developing and implementing customized educational workshops and is experienced in providing trauma response and CISD services. She possesses excellent verbal and written communication skills, strong knowledge of community resources and experience working with a highly diverse population. Geetha has her master's degree in Community Counseling, is a Licensed Professional Counselor and is a National Certified Counselor. She is also a Certified Employee Assistance Professional (CEAP), holds certification in Critical Incident Stress Management (CISM).



Brian Petz, ATC, LATC is the Executive Director for Inova's Employee Assistance Program. Brian provides business development and contract support for Inova's Employee Assistance. Part of a team that creates health benefit solutions for local organizations and businesses, Brian has closely worked with hundreds of US and international organizations to implement the latest in health and wellness benefit programs. Brian has been with Inova since 1998. Brian will provide administrative oversight and program support.



Alex Piguet is the Contracting Officer for Inova's Employee Assistance Program. Alex provides business development and contract support for Inova's Employee Assistance Program. Alex brings 14 years of sales and marketing experience in both the medical and technology arenas to the Inova team. Alex is a graduate of the U.S. Naval Academy and a prior naval officer. Alex will facilitate contract negotiation and program support.

References

We have numerous clients of similar size and scope of business to the State. Currently we serve multiple municipality/government entities similar to The State. Please feel free to reach out to the following INOVA clients:

We have numerous clients of similar size and scope of business to The State. Currently we serve multiple municipality/government entities similar to The State. Please feel free to reach out to the following Inova clients:

Prince Georges State Public Schools, Maryland (PGCPS)

IEA provides full service EAP counseling legal, financial assist, and work-life services for PGCPS. The public schools have 16,534 eligible employees under the EAP. We have provided EAP Services since September 1, 2009 to the present.

James Storm
Benefits Specialist
Sasscer Administration Building
14201 School Ln, Rm 210
Upper Marlboro, MD 20772
Prince George's State Public Schools, Maryland
(301) 952-6314
james.storm@pgcps.org



City of Alexandria, Virginia

IEA provides full service EAP counseling legal, financial assist, and work-life services for the City of Alexandria's Government Employees. In addition, Inova provides COA a full time FTE to coordinate and promote its health and wellness program. COA employs 1,740 employees that are eligible for Inova EAP services including all public safety. We have provided EAP Services since July 1, 1992 to the present.

Karen Landon
Senior Human Resources Analyst
301 King Street
Suite 2500
Alexandria, VA 22314
703.746.3783
karen.landon@alexandriava.gov



City of Monroe, OH

Inova provides full service EAP counseling legal, financial assist, and work-life services for the City's Government Employees. City of Monroe employs 120 employees that are eligible for Inova EAP services including all public safety. We have provided EAP Services since January 1, 2016 to the present.

Kacey Waggaman

Assistance City Manager

233 South Main St.

Monroe, OH 45050

(513) 539-7374

waggamank@monroeohio.org



Investment for Inova Employee Assistance and Work-Life Services

	# of Employees 400 (With Wellness Coaching)		
	EAP Counseling Session Model*		
Price Per Employee/ Month	PEPM	8 Sessions	\$2.83
Price Per Employee/ Year	PEPY	8 Sessions	\$33.96
Total EAP and Work Life Annually			\$13,584.00

***Other Session Models Available-** session model is # of counseling sessions per employee or household member per issue per year, no limit on the number of individual issues

In order to ensure that through every employee engagement, Inova’s EAP is able to provide a holistic approach to employee issue resolution, we have bundled our comprehensive services into one complete offering. Inova does not provide fee-for service pricing. All items on the detailed below are included in the PEPM shown below, including all counseling, work-life (financial and legal services, child and elder care, ID theft, daily living concierge search) staff and employee training, critical incident services, marketing materials, as well as hard copy wallet cards, brochures and posters for all 400 employees of the State of West Virginia Department of Taxation.

Pricing Includes:

- Employee Counseling Services of up to agreed-upon number of sessions face to face, telephonic or on-line counseling per issue, per employee/ household member, per year
- Referral and follow up to your organization’s insurance if needed
- 24/7/365 phone, email, on-line chat access to all eligible participants
- Customizable EAP website
- Full suite of Work Place Services to include-
 - Legal and Financial Assistance
 - ID Theft protection
 - Elder Care Services
 - Child Care Services

- Adoption Services
- Resources for children with special needs
- Parental Services
- Education and School Resources
- Convenience Services and Pet Care Services
- Skill Builders On-line Webinars for Employee Education
- Benefits Connect unifying all company benefits information
- Marketing materials and employee communication to include brochures, posters, wallet cards, welcome letters
- Lifelines Newsletter, Front Line Supervisor Newsletter, Healthy Pathways Newsletter
- **Full On-Site Orientations and Implementation**
- **14-Hour bank of onsite time to be utilized at the State's discretion for supervisory and/or educational programs per year, Per the RFP.**
- **Telephonic Wellness Coaching to include personalized program development and goal setting, educational materials on fitness and health-related topics, access to the live well wellness portal for goal setting and individual tracking.**
- **5-Year Rate Guarantee**
- Unlimited web-based and Go to Meeting employee orientations and supervisor trainings
- Supervisor training guide and unlimited Supervisor Consultation
- On-going Account Management
- Cobra participation and compliance with Government EAP regulations

Additional Services

- Additional Critical Incident Services: \$275.00 per hour, 2-hour min
- Additional On-site or live webinar health and wellness trainings- \$275 per session
- Additional On-site or live webinar Drug-Free Workplace Compliance- \$275per session
- Additional On-site employee orientations and supervisor trainings- \$275 per hour
- DOT Substance Abuse Professional Services- \$700 per Case

**EXHIBIT A
EMPLOYEE ASSISTANCE PLAN**

Item	Description	Unit of Measure	*Estimated Qty (Employees)	Cost Per Employee per Month	Extended Cost
1	Employee Assistance Plan Per Specifications Attached	EA	400	\$ 2.83	\$ 2.83
Total Bid Amount					\$ 13,584.00 / YEAR

*The Pricing Page contain a list of the Contract Items and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

Signature: 
 Company: NOVA Employee ASSISTANCE
 Date: 5-21-19

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ TAX19*12

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input checked="" type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

INOWA EMPLOYEE ASSISTANCE
Company
[Signature]
Authorized Signature
5/21/19
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Alex Piguet, Contracting Officer INOVA
(Name, Title)

ALEX PIGUET, CONTRACTING OFFICER
(Printed Name and Title)

3949 PEARL DR. #310 FAIRFAX, VA 22030
(Address)

(541) 472-0160 / (703) 385-2090
(Phone Number) / (Fax Number)

ALEXANDER.PIGUET@INOVA.ORG
(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

INOVA EMPLOYEE ASSISTANCE
(Company)

Alex Piguet, Contracting Officer, INOVA
(Authorized Signature) (Representative Name, Title)

ALEX PIGUET, CONTRACTING OFFICER, INOVA
(Printed Name and Title of Authorized Representative)

5-21-19
(Date)

(541) 472-0160 / (703) 385-2090
(Phone Number) (Fax Number)

REQUEST FOR QUOTATION
Employee Assistance Plan (EAP)

10.1 The following shall be considered a vendor default under this Contract.

10.1.1 Failure to perform Contract Services in accordance with the requirements contained herein.

10.1.2 Failure to comply with other specifications and requirements contained herein.

10.1.3 Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

10.1.4 Failure to remedy deficient performance upon request.

10.2 The following remedies shall be available to Agency upon default.

10.2.1 Immediate cancellation of the Contract.

10.2.2 Immediate cancellation of one or more release orders issued under this Contract.

10.2.3 Any other remedies available in law or equity.

11. MISCELLANEOUS:

11.1 **Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

Contract Manager: JESSIE JOACHIM, MA, NCC, CEAP, SAP

Telephone Number: (703) 246-8817

Fax Number: (703) 385-2090

Email Address: JESSIE.JOACHIM@INVA.ORG

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: NOVA Employee Assistance

Authorized Signature: [Signature] Date: 5-21-19

State of Virginia

County of Fairfax, to-wit:

Taken, subscribed, and sworn to before me this 21st day of May, 2019.

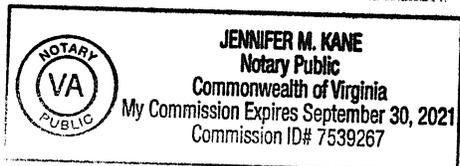
My Commission expires 9/30, 2021.

AFFIX SEAL HERE

NOTARY PUBLIC

Jennifer M Kane

Purchasing Affidavit (Revised 01/19/2018)



West Virginia Ethics Commission
Disclosure of Interested Parties to Contracts

(Required by W. Va. Code § 6D-1-2)

Name of Contracting Business Entity: INOVA Address: 3949 PENNIX DR #310

FAIRFAX, VA 22030

Name of Authorized Agent: ALEX PIQUET, INOVA Address: SAME

Contract Number: CRFQ 0702 TAX1900000012 Contract Description: EAP SERVICES

Governmental agency awarding contract: _____

Check here if this is a Supplemental Disclosure

List the Names of Interested Parties to the contract which are known or reasonably anticipated by the contracting business entity for each category below (attach additional pages if necessary):

1. Subcontractors or other entities performing work or service under the Contract

Check here if none, otherwise list entity/individual names below.

- WORK PLACE OPTIONS, RALEIGH, NC

2. Any person or entity who owns 25% or more of contracting entity (not applicable to publicly traded entities)

Check here if none, otherwise list entity/individual names below.

3. Any person or entity that facilitated, or negotiated the terms of, the applicable contract (excluding legal services related to the negotiation or drafting of the applicable contract)

Check here if none, otherwise list entity/individual names below.

Signature: [Signature]

Date Signed: 5-21-19

Notary Verification

State of Virginia, County of Fairfax:

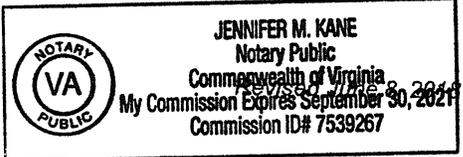
I, Alex Piquet, the authorized agent of the contracting business entity listed above, being duly sworn, acknowledge that the Disclosure herein is being made under oath and under the penalty of perjury.

Taken, sworn to and subscribed before me this 21ST day of May, 2019.

Jennifer M Kane
Notary Public's Signature

To be completed by State Agency:

Date Received by State Agency: _____
Date submitted to Ethics Commission: _____
Governmental agency submitting Disclosure: _____



Provider ID	Provider Type	City	State	Zip	County
6207473	Advanced Registered Nurs	Huntington	WV	25701	Cabell
5025090	Master Level Clinician	Huntington	WV	25701	Cabell
5025090	Master Level Clinician	Huntington	WV	25701	Cabell
5030727	Master Level Clinician	Beckley	WV	25801	Raleigh
5030727	Master Level Clinician	Ronceverte	WV	24970	Greenbrier
5036645	Master Level Clinician	Parkersburg	WV	26104	Wood
6109217	Master Level Clinician	Princeton	WV	24740	Mercer
6135177	Master Level Clinician	Huntington	WV	25701	Cabell
6141713	Master Level Clinician	Charleston	WV	25311	Kanawha
6141713	Master Level Clinician	South Charleston	WV	25303	Kanawha
6144612	Master Level Clinician	Buckhannon	WV	26201	Upshur
6146780	Master Level Clinician	Charleston	WV	25301	Kanawha
6154306	Master Level Clinician	Huntington	WV	25701	Cabell
6158320	Master Level Clinician	Keyser	WV	26726	Mineral
6158320	Master Level Clinician	Keyser	WV	26726	Mineral
6181646	Master Level Clinician	Parkersburg	WV	26104	Wood
6181646	Master Level Clinician	Parkersburg	WV	26101	Wood
6182017	Master Level Clinician	Nitro	WV	25143	Kanawha
6182542	Master Level Clinician	Huntington	WV	25701	Cabell
6604905	Master Level Clinician	Willamson	WV	25661	Mingo
6605853	Master Level Clinician	Wheeling	WV	26003	Ohio
6606422	Master Level Clinician	Wheeling	WV	26003	Ohio
6607846	Master Level Clinician	Shepherdstown	WV	25443	Jefferson
6608053	Master Level Clinician	Weston	WV	26452	Lewis
6608079	Master Level Clinician	Charleston	WV	25301	Kanawha
6608191	Master Level Clinician	Charleston	WV	25301	Kanawha
6878	Nurse Practitioner	Parkersburg	WV	26101	Wood
730	Professional Counselor	Wheeling	WV	26003	Ohio
1495	Professional Counselor	Parkersburg	WV	26104	Wood
2785	Professional Counselor	Barboursville	WV	25504	Cabell
3702	Professional Counselor	Charleston	WV	25301	Kanawha
4728	Professional Counselor	Charleston	WV	25301	Kanawha
5885	Professional Counselor	Saint Albans	WV	25177	Kanawha
5992	Professional Counselor	Madison	WV	25130	Boone
6511	Professional Counselor	Martinsburg	WV	25401	Berkeley
6511	Professional Counselor	Martinsburg	WV	25401	Berkeley
1087342	Professional Counselor	Wheeling	WV	26003	Ohio
5015471	Professional Counselor	Princeton	WV	24740	Mercer
5017360	Professional Counselor	Wheeling	WV	26003	Ohio
5018527	Professional Counselor	Mount Clare	WV	26408	Harrison
5019373	Professional Counselor	Huntington	WV	25701	Cabell
5019446	Professional Counselor	Parkersburg	WV	26104	Wood
5023980	Professional Counselor	Fort Ashby	WV	26719	Mineral
5027980	Professional Counselor	Martinsburg	WV	25401	Berkeley
5033305	Professional Counselor	Barboursville	WV	25504	Cabell
5036567	Professional Counselor	Weston	WV	26452	Lewis
5039235	Professional Counselor	Wheeling	WV	26003	Ohio
5045356	Professional Counselor	Berkeley Springs	WV	25411	Morgan
5047600	Professional Counselor	Charleston	WV	25311	Kanawha
5054616	Professional Counselor	Morgantown	WV	26508	Monongalia
6102837	Professional Counselor	Barboursville	WV	25504	Cabell

6103699	Professional Counselor	Madison	WV	25130	Boone
6108477	Professional Counselor	Martinsburg	WV	25401	Berkeley
6111417	Professional Counselor	Martinsburg	WV	25401	Berkeley
6114164	Professional Counselor	Barboursville	WV	25504	Cabell
6131357	Professional Counselor	Huntington	WV	25701	Cabell
6132839	Professional Counselor	Berkeley Springs	WV	25411	Morgan
6136602	Professional Counselor	Ranson	WV	25438	Jefferson
6137384	Professional Counselor	Weston	WV	26452	Lewis
6137755	Professional Counselor	Barboursville	WV	25504	Cabell
6138246	Professional Counselor	Morgantown	WV	26505	Monongalia
6144448	Professional Counselor	Charleston	WV	25301	Kanawha
6147535	Professional Counselor	Martinsburg	WV	25403	Berkeley
6149749	Professional Counselor	Fort Ashby	WV	26719	Mineral
6172222	Professional Counselor	Huntington	WV	25705	Cabell
6172222	Professional Counselor	Hurricane	WV	25526	Putnam
6172222	Professional Counselor	Dunbar	WV	25064	Kanawha
6196470	Professional Counselor	Martinsburg	WV	25401	Berkeley
6197045	Professional Counselor	Princeton	WV	24740	Mercer
6197839	Professional Counselor	Charleston	WV	25311	Kanawha
6200673	Professional Counselor	South Charleston	WV	25309	Kanawha
6201334	Professional Counselor	Charleston	WV	25311	Kanawha
6213266	Professional Counselor	Barboursville	WV	25504	Cabell
6213416	Professional Counselor	CHAPMANVILLE	WV	25508	Logan
6612388	Professional Counselor	Elkins	WV	26241	Randolph
6616506	Professional Counselor	Morgantown	WV	26501	Monongalia
6616654	Professional Counselor	Morgantown	WV	26501	Monongalia
6618236	Professional Counselor	Princeton	WV	24740	Mercer
6618816	Professional Counselor	Wheeling	WV	26003	Ohio
6619241	Professional Counselor	Wheeling	WV	26003	Ohio
6619451	Professional Counselor	Morgantown	WV	26505	Monongalia
6620135	Professional Counselor	South Charleston	WV	25303	Kanawha
3447	Psychologist	Parkersburg	WV	26101	Wood
3700	Psychologist	Martinsburg	WV	25401	Berkeley
3742	Psychologist	Weston	WV	26452	Lewis
3742	Psychologist	Clarksburg	WV	26301	Harrison
6690	Psychologist	Beckley	WV	25801	Raleigh
7245	Psychologist	Parkersburg	WV	26101	Wood
7325	Psychologist	Parkersburg	WV	26104	Wood
7325	Psychologist	Parkersburg	WV	26104	Wood
1095345	Psychologist	Morgantown	WV	26508	Monongalia
1095345	Psychologist	Morgantown	WV	26505	Monongalia
1105566	Psychologist	Parkersburg	WV	26101	Wood
2184006	Psychologist	Bluefield	WV	24701	Mercer
2184006	Psychologist	Bluefield	WV	24701	Mercer
3023031	Psychologist	Falling Waters	WV	25419	Berkeley
5006411	Psychologist	Ranson	WV	25438	Jefferson
5016146	Psychologist	Huntington	WV	25705	Cabell
5026858	Psychologist	Weston	WV	26452	Lewis
5026858	Psychologist	Weston	WV	26452	Lewis
5029170	Psychologist	Vienna	WV	26105	Wood
5032403	Psychologist	Parkersburg	WV	26101	Wood
5038506	Psychologist	Fairmont	WV	26554	Marion

5041930	Psychologist	Wheeling	WV	26003	Ohio
5054697	Psychologist	Charleston	WV	25313	Kanawha
6030933	Psychologist	Huntington	WV	25701	Cabell
6100938	Psychologist	Barboursville	WV	25504	Cabell
6111160	Psychologist	Nitro	WV	25143	Kanawha
6111160	Psychologist	Martinsburg	WV	25401	Berkeley
6132879	Psychologist	Mount Clare	WV	26408	Harrison
6136645	Psychologist	Barbourville	WV	25504	Cabell
6138239	Psychologist	Charleston	WV	25309	Kanawha
6138239	Psychologist	Chapmanville	WV	25508	Logan
6146811	Psychologist	Charleston	WV	25311	Kanawha
6148270	Psychologist	Morgantown	WV	26505	Monongalia
6149704	Psychologist	Charleston	WV	25311	Kanawha
6158249	Psychologist	Huntington	WV	25701	Cabell
6615499	Psychologist	Princeton	WV	24740	Mercer
6615747	Psychologist	Marlinton	WV	24954	Pocahontas
6616620	Psychologist	Terra Alta	WV	26764	Preston
6619398	Psychologist	Beckley	WV	25801	Raleigh
2787	Social Worker	Barboursville	WV	25504	Cabell
3448	Social Worker	Parkersburg	WV	26101	Wood
3522	Social Worker	Bridgeport	WV	26330	Harrison
3734	Social Worker	Bridgeport	WV	26330	Harrison
3735	Social Worker	Bridgeport	WV	26330	Harrison
6281	Social Worker	Logan	WV	25601	Logan
6686	Social Worker	Beckley	WV	25801	Raleigh
6691	Social Worker	Beckley	WV	25801	Raleigh
6832	Social Worker	Beckley	WV	25801	Raleigh
7089	Social Worker	Beckley	WV	25801	Raleigh
7296	Social Worker	Parkersburg	WV	26101	Wood
1072924	Social Worker	Charleston	WV	25301	Kanawha
5026234	Social Worker	Charleston	WV	25301	Kanawha
6010505	Social Worker	Wheeling	WV	26003	Ohio
6011416	Social Worker	Beckley	WV	25801	Raleigh
6015978	Social Worker	Mount Clare	WV	26408	Harrison
6016460	Social Worker	Morgantown	WV	26505	Monongalia
6021410	Social Worker	Petersburg	WV	26847	Grant
6021412	Social Worker	Lewisburg	WV	24901	Greenbrier
6022781	Social Worker	Charleston	WV	25309	Kanawha
6023079	Social Worker	Charleston	WV	25311	Kanawha
6026037	Social Worker	Wheeling	WV	26003	Ohio
6026314	Social Worker	Independence	WV	26374	Preston
6026347	Social Worker	Weston	WV	26452	Lewis
6026427	Social Worker	Barboursville	WV	25504	Cabell
6027116	Social Worker	Morgantown	WV	26505	Monongalia
6027243	Social Worker	Charleston	WV	25311	Kanawha
6027260	Social Worker	Charleston	WV	25309	Kanawha
6027365	Social Worker	Beckley	WV	25801	Raleigh
6027492	Social Worker	Morgantown	WV	26505	Monongalia
6027642	Social Worker	Beckley	WV	25801	Raleigh
6027656	Social Worker	Beckley	WV	25801	Raleigh
6027852	Social Worker	Beckley	WV	25801	Raleigh
6027964	Social Worker	Beckley	WV	25801	Raleigh

6027996	Social Worker	Beckley	WV	25801	Raleigh
6028503	Social Worker	Beckley	WV	25801	Raleigh
6109390	Social Worker	Huntington	WV	25701	Cabell
6113132	Social Worker	Morgantown	WV	26505	Monongalia
6114922	Social Worker	Parkersburg	WV	26101	Wood
6133336	Social Worker	Parkersburg	WV	26101	Wood
6133512	Social Worker	Barboursville	WV	25504	Cabell
6133512	Social Worker	Barboursville	WV	25504	Cabell
6136647	Social Worker	Barboursville	WV	25504	Cabell
6137667	Social Worker	South Charleston	WV	25309	Kanawha
6137916	Social Worker	Wheeling	WV	26003	Ohio
6138998	Social Worker	Ripley	WV	25271	Jackson
6143046	Social Worker	Martinsburg	WV	25405	Berkeley
6155438	Social Worker	Wheeling	WV	26003	Ohio
6618588	Social Worker	Wheeling	WV	26003	Ohio
6618818	Social Worker	Wheeling	WV	26003	Ohio
6619707	Social Worker	Scott Depot	WV	25560	Putnam
6620606	Social Worker	Bruceton Mills	WV	26525	Preston

Sample Implementation

Proposed Start Date

Assuming 30 days for implementation



8/1/2019



Implementation Overview

The vision for the implementation plan is to have the EAP fully implemented and ready to go two weeks in advance of the formal launch date. The key objectives will be:

1. At an operational level all of The State's requirements are fully understood by Inova staff involved in service delivery & contract management
2. All relevant systems and processes are in place
3. The Inova service center is geared to receive calls of any nature from The State (employees, managers, union stewards, referrals, key wellbeing stakeholders)
4. The communication and awareness/engagement material is with The State for distribution
5. The framework of events/meetings/reporting is established for the forthcoming calendar year, in particular the first 3 months
6. The management of the program is fully established to deal with scheduled, unexpected and ad-hoc events

WV Department of Taxation= The State , Inova= Inova Employee Assistance

Task Name	Responsible Party
DISCOVERY	
Understanding Expectations	
Account Manager to reach out to HR Champion at each agency within the department of taxation to ensure all needs and expectations are met.	Inova+The State
Information Technology	
Review any data security requirements for communicating report data	Inova+The State
Review The State desire for connectivity to Inova web, The State Intranet	Inova+The State
Initial Launch Review	
Post Contract Award Meeting - initial startup	Inova+The State
Review/discuss expectations around implementation	Inova+The State
Review & Set Implementation Timelines/Milestones	Inova+The State
Determine communication methods/mediums/strategy for initial launch and post launch activity	Inova+The State
Determine ongoing meeting times/dates	Inova+The State
Review and finalize implementation plan	Inova+The State
Service Requirements	
Review key locations of employees for each agency	Inova+The State
Review contracted service for The State	Inova+The State
Review customer process flow based all access point to the service (Telephonic, Web,Email)	Inova
Review The State process flow/referral process/confidentiality and whistleblowing	Inova
Operational Items within Discovery Stage	
Review access requirements.	Inova
Confirm list of key locations/divisions/business sectors in line with reporting of data. Wellness strategies by region/business/employee diversity	Inova
Program Transition	
Initial Contact Details - agree transition strategy with existing providers	Inova+The State
Agree any necessary data transfer/clinical protocols/case management of existing cases/onward referral process/contact points for Inova	Inova/Existing Provider
Communication strategy for employees - process in event of existing support - confidence in continuity. Goal of no gap in service.	Inova+The State
Review process flow-expectations around The State and each agency culture/other benefits/wellbeing strategy/key wellbeing strategies and integration with EAP support/promotion/copy/communications	Inova+The State
Discuss protocol for population updates (data integrity)	Inova+The State

<u>ENGAGEMENT & COMMUNICATION</u>	
Individual Agency Set Up	
Account Manager to meet in person with each agency contact/champion to discuss what works best for their employees, as well as what methodologies work best for program promotion	Inova+The State
Website- Internet/Intranet	
Provide demonstration of website	Inova
Verify access points for employees	Inova
Confirm company-wide login that will be used and confirm capabilities for The State IT to add link to Intranet. Agency-specific sites/logons if needed.	The State
Review Intranet text/ description of EAP service/branding/per Department content/centers	Inova+The State
Determine website branding requirements	Inova+The State
Clarify all customisation requirements	Inova+The State
Review scope--Allow 1 week for standard web setup and a minimum of 15 days for customization, if applicable	Team
Test website	Inova
Confirm website meets specifications	The State Contract Manager
Launch website	Inova
Communications/Promotions	
Review promotional documents and approve materials and copy	Inova
Review employee/manager awareness content, method/webinars	Inova
Review launch & communication strategy for each agency	Inova+The State
Analyze utilization data and make course corrections based off data to increase utilization numbers for specific agencies.	Inova+The State
Send samples of agreed communications/copy	Inova
<u>OPERATIONS</u>	
Orientation/Trainings	
Review and schedule employee presentations/manager presentations for each agency.	Inova
Quality Measurements	
Review quality processes with each agency within State, if applicable.	Inova
Discuss/review Issues process to ensure all aspects of program are meeting expectations within all State agencies	Inova
Reporting	
Provide & review sample report	Inova
Confirm report requirements and customize each utilization report for each individual agency within the State.	Inova+The State